

Annual Performance Review Process Google Docs Tips - For Supervisors

General Tips and Facts About Google Docs

1. *Saving your text*

- a. No need to look for a save option; Google Docs saves automatically every time you make changes.

Tips for Drafting Employee's Annual Performance Review

1. *Accessing employee's review form*

- a. Check the Performance Review Website, pmp.lbl.gov, and click the link provided on website.

2. *Entering feedback in employee performance review*

- a. Review the employee's text on his/her accomplishments in each section.
- b. Under each "supervisor" instruction section, in the white text box, type in your assessment of employee's performance as appropriate to that particular section.
 - i. You can refer to statements made by the employee in the above section. Both sets of statements will remain in the same sequence in the form.
- c. Use of bullets is highly recommended.
- d. Use copy and paste from word documents or other Google Docs.
- e. When you leave Google Docs, it will save your text.

3. *Coming back to complete employee's review*

- a. To continue working on your text
 - i. Click the link from your email.
 - ii. Check the Performance Review Website, pmp.lbl.gov.

4. *After completing draft of employee review, release for one-up review*

- a. Go to the Performance Review Website.
- b. Find the row for the employee in the "Supervisor Table."
- c. Select the proposed rating from the drop-down list. (Postdoctoral Scholars do not receive ratings)
- d. Click the "Share with reviewer(s)" button.
- e. Your Division will decide whether to have automatic notifications sent by email when drafts of reviews are ready for one-up review.

5. *Responding and resolving one-up reviewer comments*

- a. Look for suggested changes or comment boxes throughout the review. These are notes from the reviewer.
- b. Suggested edits appear in a different colored text but will change to the default font color once accepted.
- c. Any comments or suggested edits not addressed will be deleted during the finalization process.
- d. Suggested changes are similar to track changes made in Microsoft Word. Comments and suggestions may be in two places.
 - i. One place is at top of review. Access by clicking the Comment button in the top right-hand corner of your browser window.



- ii. Other place is comment boxes throughout the review. Comments may be close to actual text that comment refers to.
 - e. You can reply to a comment with a new post, edit or delete a previous comment, and resolve the discussion when you're ready to remove it.
 - f. You can also accept changes by clicking on the check in the comment box or reject changes by clicking on the "x."
 - g. Resolving a discussion removes the discussion from the review document, but resolved threads will always be available under Comments in the right-hand corner of your document.
 - i. These comments will not be seen on the final document
 - h. *If you'd like to address your comment to a specific person (i.e. one-up reviewer), type a plus sign followed by their email address (e.g.: +johndoe@lbl.gov). That person will receive an email with your comment.
- 6. Completing employee's review**
- a. Once you have resolved all reviewer comments, accepted or rejected suggested changes and **received clearance from your division management to release the review**, go to the Performance Website and click the "Release review to employee" button for that employee in the "Supervisor Table."
 - b. Click the "Submit" button.
 - c. Note: Releasing a document will share the document automatically with the employee. Make sure you have received clearance and are ready for the employee to see the review.
- 7. Viewing "released" employee review**
- a. Login to pmp.lbl.gov
 - b. Click on the link to view the document.
 - c. Once the review is in "released" status, the review is shared with the employee and he/she can view it prior to the review discussion meeting.
 - d. To print, click on the printer icon to print the review.
- 8. Signing "finalized" employee review**
- a. Signatures are now done electronically through HelloSign and initiated by the supervisor.
 - b. Login to pmp.lbl.gov and click the "Initiate signing" button review.
 - c. Click the "Submit" button.
 - d. This will initiate the signature process and send an email to the employee requesting for him/her to sign the document.
 - e. Once the employee has signed, check your email inbox for an email with the subject line "[employee name] 2017 Performance Review - Signature requested by Performance Review Process Team."
 - f. Click the button in the email to be taken to HelloSign to sign the employee's performance review electronically.
 - g. Follow the instructions on screen from HelloSign to sign electronically.
 - h. Both you and the employee will receive pdf copies of the document in your email inbox.

FAQs for Supervisors

- 1. Can I access last year's review for this employee?**
 - a. Last year's review will be on the Performance Review website. Click on the "Prior year review" link in the supervisor table.
- 2. Can I access it after it's been submitted as complete?**
 - a. Once you have checked "Release to employee" and clicked the "Submit" button, the document will be visible to the employee.
 - b. You can make changes to the document before initiating signing. For example, if you decide to change content of the review after discussing it with the employee, login to pmp.lbl.gov and make the edits directly before initiating the signature process.
 - c. If you need to make changes after signing the document, please contact your Division Process Owner.
 - d. You can view the final document by clicking the "Final document" link in the Supervisor Table.
- 3. How do I know if the one-up reviewer has reviewed it?**
 - a. If your division chose to use automatic notifications, you will receive an email to let you know who has reviewed the document.
 - b. If your division has not chosen this option, you can go to the Performance Review Website, which will show who has completed their One-up reviews.
- 4. How can I see changes from one version of the review to the next after the one-up reviewer has commented (version control/history)?**
 - a. Select "File," then see revision history.
 - b. Click a timestamp in the right pane to see a previous version of the document, edited by the collaborators listed below the time stamp.
 - c. Any changes made by a particular collaborator will be shown in the body of the document in the color assigned to that individual in the revision history pane.

*For tips on how to complete your own self-assessment, please see the FY17 Annual Performance Review Google Doc Tips for Employees, available on the [HR Performance Management Webpage](#).